

# Monthly Status Reporting

## Revision Working Team

### Meeting Minutes

**DAY:** 1/09/07  
**TIME:** 1:00pm – 2:00pm  
**LOCATION:** 3900 Conference Room 39A

<b>Meeting Called By:</b>	Gaye Mays		
<b>Meeting Purpose:</b>	Continue to evaluate monthly status reporting process		
<b>Attendees:</b> Unable to attend: Steve Tedder, David Butts, Greg Jones	Gaye Mays – EPMO Steve Tedder - EPMO David Butts - Wildlife Resources Commission Jim Rhew - DHHS	Bob Giannuzzi - EPMO Barbara Swartz – Strategic Initiatives Richard McGee – EPMO/QA	Greg Jones – Crime Control Lucy Cornelius – DPI Manny Zech – DOT Jim Tulenko- Strategic Initiatives
<b>Meeting Documents:</b>			
<b>Attachments:</b>			
<b>Next Meeting:</b>	1/23/07 @ 1pm 3900 Conference Room 39A		

### Discussion Points

1	<p><b>Agenda topics discussed:</b></p> <ul style="list-style-type: none"> <li>• <b>PPM Tool Resource Tracking Update</b> -Todd Russ reported back to the team that since he tracks hours by individual the high level tracking in the PPM tool would not greatly benefit his area. Duplicate work would be required to maintain the detailed worksheet and input a subset of this information into the tool. This would offset any benefit of the auto calculation of the hours for the monthly status report.</li> <li>• <b>Monthly Status Reporting – Initiation Phase (Hold, Start, Cancel)</b> – the team was in agreement that implementation of a 90 day review period would be better than requiring status reporting during initiation. The concept is to require agencies after 90 days to either start, put on hold or cancel the project. For projects put “on hold” a second review timeframe would need to be established.</li> <li>• <b>New “one page” status report format</b> – Gaye will send soft copies of the draft report to team members for feedback. Jim Tulenko will check with the UMT group to determine if a “one page” report is possible.</li> <li>• <b>Milestones Presentation</b> – Dick McGee handed out a presentation he has developed to train individuals on the definition, purpose and use of milestones as relates to project reporting. The group will review and provide feedback.</li> </ul>
2	<p><b>“Top 10” problems/issues identified with current process: (<i>Long term vs. short term solution noted</i>)</b></p> <ol style="list-style-type: none"> <li>1. Difficulties with using the PPM tool/overall inflexibility - <i>Long term</i></li> <li>2. Tool should measure triple constraints (scope, cost, schedule) but currently does not measure these accurately – <i>Long term</i></li> <li>3. Project schedule measurement is “time consumption” rather than an “earned value” type metric – <i>Long term</i></li> <li>4. Under utilization of resources is viewed as a negative – <i>Short term (perception issue)</i></li> <li>5. Need to more clearly define milestones to make them more meaningful – <i>Short term</i></li> <li>6. PPM tool does not accommodate the conceptual phase of a project, thus when the project meets the criteria to be input into the tool, the level of detail required may be difficult to capture and the PM must complete a number of “catch up” status reports – <i>require status reports during initiation?</i></li> <li>7. PPM tool does not accommodate other development methodologies such as “Agile” – <i>Being addressed by gate review team</i></li> </ol>

	<p>8. Cannot see appropriate detail in current tool status report i.e. detail on issues and risks – <i>Long term</i></p> <p>9. Limited capacity for comments and ability to reference historical information – <i>Long term</i></p> <p>10. Resource management is not integrated into UMT tool. Difficult to accurately reconcile time for all resources. – <i>May have partial short term solution</i></p>
3	<p><b>Recommendations (short term):</b></p> <p>Keep current monthly status reporting process in place with the following changes:</p> <ul style="list-style-type: none"> <li>• Encourage agencies that produce manual status reports to attach in the tool as additional information regarding their project</li> <li>• Work with Jim Tulenko to determine if changes can be made to the current status reporting format to develop a new report that agencies can use internally for their senior management updates</li> <li>• Flag projects that are under budget overall by 10% as yellow and over by 15% as red</li> <li>• EPMO should provide training/examples on clearly defined milestones</li> <li>• Implement a 90 day review of projects in initiation to determine if the project will go forward, be put on hold or cancel.</li> </ul>
4	<p><b>Project Approach &amp; Updates:</b></p> <ul style="list-style-type: none"> <li>• Define audience for monthly status reports –<i>representative agencies have defined the audience status reports are prepared for in their agency; the PPM tool status report is primarily used by the EPMO QA group</i></li> <li>• Define elements that should be included in status reports – <i>in progress</i></li> <li>• Define/evaluate status codes (red, green, yellow, etc.) and alerts – <i>in progress</i></li> <li>• Collect example reports already in use – <i>in progress</i></li> <li>• Formulate recommendations – identify “quick wins” and long term requirements</li> </ul>

## Action Item Updates

1	Validate audience for EPMO monthly status reports – Gaye will discuss with Sharon Hayes – <i>11/15 Sharon advised that the current monthly status reporting process is designed to provide project information to facilitate the QA process.</i>
2	Draft suggested changes to “jelly bean” parameters – Steve Tedder & Lucy Cornelius – <i>11/28 Lucy completed DHHS feedback</i>
3	Evaluate PPM resource tracking functionality – Vicky Kumar & Todd Russ have agreed to test – <i>1/5/07 feedback provided by Todd Russ (see agenda comments)</i>